

How to Create a Webform

Contents

Creating The Webform	
Page.....	2
Understanding Form	
Components	2
Adding Components to Your	
Form.....	3
Setting Up Form Emails	
.....	3
Email to the Staff or Site Manager	
.....	3-4
Email to the User	
.....	4 -5
Form Settings (Confirmation Message for User)	
.....	6
Viewing Form Submissions.....	
.....	6-7

How to Create a Webform

Creating the Webform Page

The webform page is no different than creating a webpage. If you do not know how to create a webpage please see the Training article titled "2_Web Page Basics (Create, Edit, Delete)"

1. Go to the "Create Webform" link on the dashboard
2. Add a title for your form
3. Add any text in the body field (Example: Please fill out the survey below)
4. Select the appropriate microsite if applicable
5. Add an image (optional)
6. Add a menu link (optional)
7. Click Save (you will see a message that your form has been created and that the next step is to add components to the form)

Understanding Form Components

Form components are the part of your webform where users will enter information. Below is a brief description and examples of the different types of components used on a form.

Date - presents the user with month, day, and year fields

E-mail - a special text field that accepts e-mail addresses

Fieldset - allows you to organize multiple fields into groups that will be surrounded by a box

File - allows users to upload files. Please discuss with IT and Aha before adding this to a form.

Grid - allows the creation of grid questions, denoted by radio buttons

Hidden - a field which is not visible to the user, but is recorded with the submission

Markup - this field allows you to display text within the form. It does not capture any input from the user.

Number - a specific field that accepts only numbers

Page Break - sets a break in the form, allowing the form to be organized into multiple pages.

Select Options - allows creation of checkboxes, radio buttons, or select menus

Table Element - allows you to build tables with multiple inputs in the table. Need to work with Aha in order to get configured.

Textarea - a large text area that allows the user to add multiple lines of information (Ex: Comments/Feedback)

Textfield - a basic textfield. (Ex. Last Name)

Time - presents the user with hour and minute fields. Optional am/pm fields can be set.

How to Create a Webform

Adding Components to Your Form

1. Type in a name for the component
2. Select the type of component you are adding (see list above)
3. Check off whether this is a mandatory component for your form
4. Click Add

A screen will appear with settings for the component you are adding. Here you can customize details for the type of component you are adding. If you do not select any custom settings the form component will be added using default settings. You can always add the component using the default settings at first, then go back to edit and make changes later if you want. Examples and descriptions of each option will be given on the screen.

Available options vary depending on the type of component you are using.

NOTE: The field Key will be set based on the label you set for the field, there is no need to change this.

When you have selected the options you want click Save Component.

Now that you have added a component to your form a submit button will automatically be generated. Click on the View button at any time to see how your form looks to the user.

Setting up Form Emails

Form emails are used to communicate with the user submitting your form and to send information that was added to the form to a staff member or site manager. Below are instructions for setting up both types of emails:

Email to the staff or site manager

1. Still under the Webform button, click the Emails button
2. Type in the email address of the staff member that should receive information about the form being submitted.
3. Click Add. A screen will appear with settings for the email.
4. In the E-mail header details select the Email subject, from address, and from name. By default the sitewide email address and default subject will be pre-filled. You can customize as needed based on the needs for the form.
5. In the E-mail template section you will see a default template. This includes the text needed to capture the results submitted in the form. These results will get sent in the email. This allows the person receiving the email to see what was submitted. You can add custom text into this area as well.
6. Click Save Email Settings.

How to Create a Webform

Email to the user

1. Still under the Webform button, click the Emails button
2. Select the button next to Component value for the email address (this will capture the address submitted by the user)
3. Click Add. A screen will appear with settings for the email.
4. In the E-mail header details select the Email subject, from address, and from name. By default the sitewide email address and default subject will be pre-filled. You can customize as needed based on the needs for the form.
5. In the E-mail template section you will see a default template. This includes the text needed to capture the results submitted in the form. These results will get sent in the email. This allows the person receiving the email to see what was submitted. You can add custom text into this area as well.
6. Click Save Email Settings.

Form Settings (Confirmation Message for User)

1. Still under the Webform Settings, Click the Form Settings button
2. Type in a message that you would like displayed to the user
3. Set the redirection location. By default this will be set to display as a page to the user. You have the option to specify a specific url for redirection such as the homepage of the website. If you select to specify a url the text written above will display as a message, not a confirmation page.
4. Set a Submission limit. By default it is unlimited, but you are able to limit how many times a user can submit the form. Note: Once they have reached their limit of submissions the form components will no longer be visible to them, they will only see any screen text you created back in step one.
5. Set Submission access. This should be left as is, unless a form is being created for internal use for a specific role. The two roles checked off should be anonymous and authenticated users.
6. Click Save Configuration.

Form Validation

1. Under webform settings select the Form Validation button.
2. From the list select a rule that you would like to set up for a specific field.

How to Create a Webform



3. Type in a rule name, select the

component to apply the rule to, and enter in the rule details.

4. You can always edit or delete a rule later.

Viewing Form Submissions

Internal staff are able to view form submissions at any time. In this area staff is also provided with tools for analysis and exporting of the submitted data.

1. Click on the Results Tab, there will be five options available

Submissions - this displays user submissions

Analysis - Shows web based statistic data for each component

Table - displays all responses at once in a single table format list

Download - provides options for download in a delimited or Excel-formatted spreadsheet. The download contains user response information.

Clear - allows you to delete all previous submissions. This action cannot be undone. It is typically used for a type of survey that you would want to restart and therefore clear out old information.